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Installation Guide for

# EDExpress for Windows

2006-2007

U.S. Department of Education



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F E D E R A L  
STUDENT AID

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# Introduction

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## Preface

EDEExpress for Windows is a fully integrated software package provided by the U.S. Department of Education (ED) that enables schools to process, package and manage student financial aid records electronically in an easy-to-use Windows format. The following modules are available in EDEExpress:

- Application Processing—For managing your Free Application for Federal Student Aid (FAFSA) application data. EDEExpress interfaces with the FAA Access to CPS Online Web site so you can enter and submit data directly to the CPS.
- Packaging—For packaging financial aid awards for your students.
- Direct Loan—For originating loans, printing Master Promissory Notes (MPNs), and submitting disbursement records.
- Pell—For processing Federal Pell Grant award and disbursement data for your students.

EDEExpress 2006-2007, Release 1.0, contains the Application Processing and Packaging modules. Release 2.0 contains the Direct Loan and Pell modules.

Review the *EDEExpress for Windows 2006-2007 Cover Letter* associated with each release for a comprehensive list of enhancements. You can download the Cover Letter and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov).

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# EDExpress Features

## Integrated PC Software Package

EDExpress is a fully integrated PC software package that enables you to create and manage a database of financial aid records. Cross-module functions include:

- Maintaining application databases
- Tracking the receipt of student documents
- Creating student financial aid award packages
- Printing award letters
- Generating Pell and Direct Loan documents for transmission to the Common Origination and Disbursement (COD) system
- Importing processed data files from the CPS and COD into your database
- Exporting external files for use in other school software
- Importing external files to update records before exporting and transmitting to COD
- Querying a student database
- Generating and printing reports
- Creating user-defined fields
- Setting passwords and controlling user access

## Access 2002

The EDEExpress database uses a Microsoft Access 2002 format. Note the following:

- Access 2002 software databases are compatible with all currently supported Microsoft Windows operating systems, which include Windows 98, Windows Me, Windows 2000, and Windows XP.
- You do *not* need any version of Microsoft Access (97, 2000, 2002, or 2003) installed on your PC to use current or future releases of EDEExpress.
- You cannot open or view the EDEExpress 2006-2007 database using a version of Microsoft Access earlier than Access 2002. Microsoft Access 2002 databases are incompatible with other versions of Access.

ED continues to discourage users strongly from viewing or manipulating any EDESuite software database using Microsoft Access. Making changes to the database (using any version of Microsoft Access) can potentially cause damage to the database structure, affect proper software functionality, and limit our ability to assist you with problems you may encounter as a result.

If you choose to open any EDESuite database using Microsoft Access, you should ensure you are opening a copy of the database and not your live, “production” database. You should also ensure you have safe, reliable backups of your EDESuite databases before using Microsoft Access to open live or backup copies of the databases.

**Important Installation Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install EDEExpress 2006-2007. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. After an Administrator has installed EDEExpress, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or “domain”) as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school’s technical department if you receive a warning that an Administrator must install the EDEExpress software.

## Product Updates for Section 508 Compliance

EDEExpress 2006-2007 contains updates to software grids, field labels, and help text to ensure compatibility with screen reader technology used by the visually impaired, in compliance with Section 508 of the Rehabilitation Act.

Screen reader software cannot interpret color shading in EDEExpress software entry fields or directly read the contents of software grid cells. To accommodate these restrictions, EDEExpress users will notice the following major changes:

- All software fields that are shaded yellow to indicate they are required will now also display a “-R” after the software label. The “-R” indicates the field is required.
- All software fields that are shaded blue after a previously saved value has been modified will now also display a “-C” after the software label. The “-C” text indicates the field has been changed. If the change is made to a field that is shaded yellow, the “-C” text will replace the “-R” text after the label.
- All software grids now display “floating” text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or one cell below, for cells in the first line of the grid) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.

The first time you log into EDEExpress, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the Enable 508 Grid Functionality? checkbox on the Security Users dialog box. To disable the floating text, go to **Tools, Setup, Security Users** and create a new user ID and password. Exit the software, and then log back in with your new user ID and password.

**Note:** Users will always see the “-R” and “-C” text added to software fields.

## Demographic Record

The EDEExpress database is organized around a feature called the demographic record. Each student in your database has a demographic record that stores the student’s address, telephone number, Social Security Number (SSN), and other demographic information.

When you enter or edit a student record, you start on the Demo tab and access the student’s other financial aid records from there; for example, you can access a student’s packaging information by clicking the Awards, and Pell and Direct Loan data by clicking the Origination or Disbursement tabs.



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## EDconnect

The Student Aid Internet Gateway (SAIG) is the U.S. Department of Education's (ED's) information highway, linking members of the financial aid community with Federal Student Aid and the Title IV Application Systems. Federal Student Aid provides the EDconnect software to make it possible to send and receive data through the SAIG.

You can download the EDconnect software, the *SAIG Desk Reference for EDconnect*, and the *Installation Guide for EDconnect* from ED's Federal Student Aid Download (FSAdownload) Web site located at [fsadownload.ed.gov](http://fsadownload.ed.gov).

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## Using this Installation Guide

Use the instructions contained in this Installation Guide to install EDEExpress on your PC or local area network (LAN).

In this guide, you will find information on hardware and software requirements, estimating the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See “Installation Instructions” in this guide for additional instructions.

# Installation Instructions

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## Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing EDEExpress on a single-user system.

We provide instructions for network system installations in the “Local Area Network (LAN) Information” section of this installation guide.

Other topics included in this section are:

- Default folder creation with installation
- FSAdownload Web site
- Downloading documentation and software from the FSAdownload Web site
- Installing the software
- Installation log
- Changing the database path for EDEExpress
- Uninstalling the software

## Folder Creation

The installation process automatically creates the following folder for EDEExpress files on your local hard drive:

**C:\Program Files\EDESuite\EDExpress for Windows 2006-2007**

The installation program assumes that the C drive is your local hard disk, but you can change the drive letter if necessary. In addition, you can use a different name for the folder.

**Caution:** You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each EDEExpress software update you receive for enhancements to be loaded properly.

## FSAdownload Web Site

You can download the EDEExpress software in two formats from the FSAdownload Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov). You can download the entire software in one file, called express67rX.exe, where “X” is the release number (for example, EDEExpress Release 1.0’s single install file is called express67r1.exe). Alternatively, you can download the software in separate installments, which you can copy to a network drive, CD, or Zip drive. You cannot use floppy disks because they do not have enough storage space.

See “Downloading Software from the FSAdownload Web Site” in this guide for more details.

**Caution:** Before you install EDEExpress, make sure you close all Windows applications.

## Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from <a href="http://fsadownload.ed.gov">fsadownload.ed.gov</a> .	Read “Downloading Documentation from the FSAdownload Web Site” for instructions.
2	Download the software from <a href="http://fsadownload.ed.gov">fsadownload.ed.gov</a> .	Read “Downloading Software from the FSAdownload Web Site” for instructions.
3	Install the software.	Read the “Installing the Software on a Single-User System” section for instructions.

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## Downloading Documentation and Software from the FSAdownload Web Site

You can download Federal Student Aid software from the Internet on ED's Federal Student Aid Download (FSAdownload) Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov). This site also houses user documentation such as the EDEExpress Desk References, Technical References, and Cover Letters for easier and more efficient use of EDEExpress.

### Sample Download Times

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have a direct connection to the Internet, we recommend a 56 kbps modem.

The table below shows approximate download times for various file sizes and connection speeds. The actual times vary depending on the type and quality of your Internet connection.

Download Speed	1 Megabyte	5 Megabytes	10 Megabytes
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	3 min.	16 min.	32 min.
768 kbps or higher (typical for cable modems and DSL)	15 sec. or less	1 min., 15 sec or less	2 min., 30 sec or less
1.5 mbps or higher (typical for T1 lines)	7.5 sec. or less	37 sec. or less	1 min., 15 sec. or less

### Getting Help

- Some organizations block their users from downloading files from the Internet. If you are having trouble downloading, contact your technical support staff to ensure you have the ability to download files from the Internet.

## Downloading Documentation from the FSAdownload Web Site

You can download EDEExpress documentation from the Internet in Adobe PDF (Portable Document Format) format.

The following types of documentation are available to download for EDEExpress:

- Cover Letters
- Installation Guides
- Desk References
- Technical References

Each document description includes the date it was posted, the file size, and gives an approximate download time. However, the length of time it takes to download a document depends on the speed of your Internet connection.

### *To Download Documentation*

1. Go to the address field located at the top of your Web browser's window and type [fsadownload.ed.gov](http://fsadownload.ed.gov). You may need to press the **Enter** key or click the **Go** button.
2. Click the **Software and Associated Documents** link.
3. Click **EDEExpress 2006-2007 Release X** (where X is the release number) to the left of the description. You are taken to the download site.
4. Choose the type of documentation you want to download by clicking the appropriate **PDF Format** link associated with the file.
5. If you would like to save a copy of the document to your system click **File, Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer. The Web site is designed to give the file a default name; however, you can choose another name for the file.
6. After the document is downloaded, go to the saved location and double-click the file to open and print it.

## Downloading Software from the FSAdownload Web Site

We distribute EDEExpress and its related documentation through the Internet using the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, [fsadownload.ed.gov](http://fsadownload.ed.gov). The software is available in two formats. You can download the entire program in one file (express67rX.exe [where X is the release number]), or in separate installments, which can be copied to a network drive or diskettes.

### *To Download the Software as One File*

1. Go to the address field located at the top of your Web browser's window and type [fsadownload.ed.gov](http://fsadownload.ed.gov). You may need to press the **Enter** key or click the **Go** button.
2. Click the **Software and Associated Documents** link on the left-hand side of the page.
3. Click the **EDEExpress 2006-2007 Release X** (where X is the release number) link. You are taken to the download site.
4. Click the **Full Download** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.
5. Select the download location and click **Save**.

**Note:** You can save the file to your hard drive, network drive, CD, or Zip drive. You cannot use floppy disks because they do not have enough storage space.

**Note:** The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the file is downloaded, go to the saved location and double-click **express67rX.exe** (where X is the release number) to extract the file and install EDEExpress.

**Note:** See "Installing the Software on a Single-User System" or "Installing the Software on a Network" in this guide for more information on how to install EDEExpress after you have downloaded the software.

### ***To Download the Software in Separate Installments***

1. Go to the address field located at the top of your Web browser's window and type [fsadownload.ed.gov](http://fsadownload.ed.gov). You may need to press the **Enter** key or click the **Go** button.
2. Click the **Software and Associated Documents** link on the left-hand side of the page.
3. Click the **EDEExpress 2006-2007 Release X** (where X is the release number) link. You are taken to the download site.
4. Click the **Disk 1** link in the software section. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.
5. Select the download location and click **Save**.

**Note:** The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the download of Disk 1 is finished, click **Disk 2**. Save Disk 2 to the same location as Disk 1.
7. Click each succeeding disk until each disk has been saved to the same location on your computer.
8. After the software disk files are downloaded to your computer, go to that location, double-click **disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click **setup.exe** to install the EDEExpress software.

**Note:** See “Installing the Software on a Single-User System” or “Installing the Software on a Network” in this guide for more information on how to install EDEExpress after you have downloaded the software.



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# Installing the Software on a Single-User System

Downloading EDEExpress from [fsadownload.ed.gov](http://fsadownload.ed.gov) does not install the software on your system. After downloading the software to your computer, you must run the installation program to load the software to your PCs or network. To install the software on a LAN, see “Installing the Software on a Network” in this guide.

**Important Installation Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install EDEExpress 2006-2007. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. After an Administrator has installed EDEExpress, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or “domain”) as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school’s technical department if you receive a warning that an Administrator must install the EDEExpress software.

EDEExpress 2006-2007, Release 1.0, contains the Application Processing and Packaging modules. Release 2.0 contains the Direct Loan and Pell modules.

Global functionality and the Application Processing module install automatically with either release. In addition to the User Database and Document Tracking functions, Global functionality includes basic global setup options (for example, security and system functions) applicable to all modules. You need to complete these setup options before processing your Title IV financial aid data in EDEExpress.

## Installation Options

You can install the EDEExpress software to a standalone PC using one of two options:

1. **Stand Alone Full.** Use this option when you are installing EDEExpress 2006-2007 to a single, non-networked computer for the first time and want to install all available EDEExpress modules.

**Warning for Subsequent Installations:** Use caution when using the Stand Alone Full installation option. This option overwrites your existing EDEExpress database (**expres67.mdb**) and all program files (including **expres67.exe**), as well as any annotations you may have made to online Help.

2. **Stand Alone Custom.** Use a Stand Alone Custom installation in one of two ways on a single non-networked computer:

If you have already installed a full release of EDEExpress, you can use the Custom option to add files such as Help files (\*.hlp), the executable (\*.exe) file, or the database (\*.mdb) that you did not select when you initially installed the software.

**Caution:** Selecting **Database** during a Custom installation will overwrite your existing EDEExpress database, including all student data.

To upgrade EDEExpress (for example, from Release 1.0 to Release 2.0), choose the Custom installation option and select everything except Database (\*.mdb). This is the default.

**Note:** If you previously installed an EDEExpress module it will not appear in the Select Components dialog box during the Custom installation process; any updates to the module will be installed automatically.

### ***Steps to Install***

1. Be sure to close all Windows applications.
2. If you downloaded the **express67rX.exe** (where X is the release number) file from the FSAdownload Web site, go to the location of that downloaded file.
3. Double-click the **express67rX.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.
4. EDEExpress asks you a series of questions during the installation. The default answer for each question is already selected for you. Under normal circumstances, you should accept the default answer.

If the default answer is correct, click **Next** to go to the next installation screen.

You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each EDEExpress software update you receive for enhancements to be loaded properly.

**Note:** Click **Yes** if you receive a message asking if you want to overwrite any read-only files when installing the software.

5. Continue this process until you reach the last installation screen, where you click the **Finish** button.

6. When the EDEExpress installation process is complete, your Start menu is updated and displays an icon for EDEExpress for Windows 2006-2007. However, desktop icons are not created automatically. You are prompted to restart your computer to complete the installation.

## Installing Subsequent Releases

When you install an update release of the EDEExpress software (for example, Release 2.0 to a version of the same year, such as Release 2.1), which may be posted to resolve software issues, a special process updates the database. The update process occurs the first time the software is started after installing the software upgrade. It runs only once, whether on a stand-alone or network database. If there are no updates to the database, this update does not occur.

**Note:** See “Installation Options” in this installation guide for more information about installing subsequent releases.

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## Windows Installation Log

When you first install EDEExpress 2006-2007, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **Express12x.log**. The EDEExpress installation log is updated during each 2006-2007 installation and contains a detailed record of all files affected during the installation of the software.

The information tracked in the installation log includes the EDEExpress installation directory, the Windows directory, the Windows system directory, whether or not a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, and information about files before and after installation. This information can be helpful to users and to CPS/SAIG Technical Support in researching software issues that may occur.

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# Changing the EDEExpress Database Path

You can change the EDEExpress database path from within the EDEExpress software.

## To Change the Database Path

1. Open EDEExpress and select **Help, System Information**.
2. Click the **Files Information** tab.
3. Click the **Registry** button.
  - A Registry Viewer application displays with a split view.
  - In the left frame, you see a tree-style view, and in the right frame, you see a list-style view with two fields: **Name** and **Value**.
  - Select **EDEExpress** under Year67.  
If you do not see the “Year67” label in the left frame:
    - Left-click the + (plus sign) next to EDESuite.
    - You will see a label indicating the software’s year cycle under EDESuite.  
If you do not see the “Express” label in the left frame:
    - Left-click the + (plus sign) next to Year67.
    - You will see a label indicating the software’s name.
    - Highlight the name of the software.
4. On the right frame of the split window, find **Database** under the Name field, click it, and select **Edit, Edit** from the menu bar.
  - A New Registry Value dialog box appears with two edit boxes.
  - One box is labeled “Name” (which is disabled), and the other box is labeled “Value.”
5. Enter your **new database path** in the box next to Value. Include the full path and database name (expres67.mdb) exactly as it appears in Windows Explorer, with uppercase and lowercase letters.

6. Press **Enter** or click **OK**.
7. A message appears indicating that the Registry value is saved. Click **OK**.
8. Exit the Registry Viewer by going to **File, Exit**.
9. Click **OK** to exit the System Information dialog box.
10. **Exit** the EDEExpress software.

The next time you start EDEExpress, you will connect to the database using the new database path. You can confirm your connection to the new database by viewing the current database name and location in the status bar on the bottom of the main EDEExpress window.

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# Uninstall

To uninstall EDEExpress, click **Start, Programs** from your Windows desktop and select **EDESuite, EDEExpress 2006-2007** to see an icon for the Uninstall utility.

**Warning:** If you are running EDEExpress on a stand-alone PC, the Uninstall process deletes your current EDEExpress database, the executable file, and all Dynamic Link Library (DLL) files, as well as icons created during the installation of the EDEExpress software from the Start menu and the software's program group. Do not run the Uninstall process unless you are sure you want to delete these files from your PC.

If your EDEExpress database is installed on a LAN, running the Uninstall utility deletes all EDEExpress files and icons from your workstation, but does not delete the EDEExpress database on your network.

## To Uninstall EDEExpress

1. Click the **Uninstall** icon. A prompt asks if you are sure that you want to remove the application and all of its components completely.
2. Click the **Yes** button.
3. Click **OK**.

EDEExpress may also ask you additional questions during the Uninstall process. Click either **Yes** or **No** as appropriate in response to these questions.

**Warning:** Do *not* uninstall the EDEExpress software before performing a Custom installation.

# Getting Started

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## Logging In for the First Time

The first time you start EDEExpress, the Startup Information dialog box appears. Before you can use EDEExpress, you need to enter the default user ID and password, create a new password, and establish your school as the assumed school used by EDEExpress. We provide instructions for these tasks in this section.

### Startup Information Box

The first time you launch EDEExpress, you see the **Startup Information** dialog box. This dialog box displays various messages, warnings, or errors. One of these messages alerts you that an Assumed School Code has not been defined.

See “Setting your Assumed School Code” for step-by-step instructions.

### *To View and Close the Startup Information Box*

1. The first time you start EDEExpress, the Startup Information dialog box appears.
2. Review the messages, warnings, or errors displayed.
3. Click **Close** or press **Enter** to close the Startup Information dialog box.

**New for 2006-2007!** For compliance with Section 508 of the Rehabilitation Act, the Startup Information dialog box grid displays floating text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or one cell below, for cells in the first line of a grid) the selected cell. The text lists row number, column title, and (if applicable) the current value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.



Floating text cannot be disabled for the Startup Information dialog box, although it can be enabled or disabled on other grids for specific users by selecting or clearing the Enable 508 Grid Functionality? checkbox in the Security Users dialog box.

## User ID and Password

Each time you start EDEExpress, you must enter a valid user ID and password. For system security, we recommend you define a unique user ID and password for each user.

To access EDEExpress for the first time and establish your new password:

1. Type in the default user ID, **SYSADMIN**.
2. Type in the default password, **SYSADMIN**.
3. Type a **new password** in the New Password box. You must change the default password by typing a new one in this field.

You can enter up to eight alphanumeric characters.

4. Type the **new password** again in the Verify Password field.

The New Password and Verify Password must be the same.

5. Click **OK** to log in.

**Note:** The SYSADMIN user ID should be reserved for system administrator functions. All users should have a unique user ID and password for logging into EDEExpress.

**New for 2006-2007!** Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. To disable the floating text, select **Tools, Setup, Security Users** from the menu bar and create a new user ID and password. Exit the software, and then log in again with your new user ID and password.

For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.

Refer to the topic “Security Users dialog box” in online Help for information on setting up user IDs and passwords for your staff.

After you enter your new password, define your Assumed School Code and other software settings in **Tools, System Setup**. See the “Setting Your Assumed School Code” topic in online Help for step-by-step instructions.

## Prior Year Data Dialog Box

If you have the prior year release of EDEExpress installed (for example, EDEExpress for Windows 2005-2006, Release 2.0), you can save time by using the EDEExpress 2006-2007 Prior Year Import feature to pull forward setup information and other data from your 2005-2006 database into your 2006-2007 database.

EDEExpress 2006-2007 allows demographic data, most setup information, most queries, and any file formats you have created to be moved forward from the prior year. Pell and Direct Loan Prior Year Disbursement Profiles that are imported will need to be updated and saved successfully before they can be used.

### ***Data That Can Be Moved Forward from the EDEExpress for Windows 2005-2006 Database to EDEExpress for Windows 2006-2007***

- Demographic (Demo tab) data
- Query—Global, App Express, Packaging, Pell, Direct Loan
- Global Setup
  - Security Groups
  - Security Users
  - Document Tracking
  - User-Defined Letter Text
  - System
  - File Management
  - **New for 2006-2007!** File Formats
  - User Database
  - **New for 2006-2007!** FAA Access
- Application Processing Setup
  - System
  - File Formats
- Packaging Setup
  - Academic Year Profiles
  - Fund Maintenance
  - Award Methodologies
  - Budgets
  - SAP Values
  - System
  - User-Defined Formats
  - File Formats
- Pell Setup
  - File Formats

- Direct Loan Setup
  - File Formats
- COD Setup
  - Direct Loan School
  - Pell School
  - System
  - Tolerances
  - Disbursement (Both Direct Loan and Pell, Direct Loan only, or Pell only)
  - MPN Printer

### ***Data That Will Not Be Moved Forward***

- Queries that reference modified or deleted fields, or date parameters
- Packaging Fund Maintenance fund amounts
- **New for 2006-2007!** File Formats with more than 255 fields selected are not imported. File formats are now limited to a maximum of 255 fields. Only file formats with 255 fields or fewer can be imported into the current year's software.

**Important Note:** If you import Security Groups, access rights for the groups do *not* carry forward. You will need to reassign access rights for the groups in Security Groups setup.

Also note that Pell and Direct Loan Prior Year Import options are not available until after you have installed EDEExpress 2006-2007, Release 2.0.

After logging into EDEExpress 2006-2007, Release 1.0 for the first time, you are prompted with the Prior Year Data dialog box that enables you to import your prior year user-defined queries, setup, and demographic data from EDEExpress 2005-2006. If you do not want to perform this function at this time, but want to be reminded each time you log in, click **No** but do not select the **Don't show me this again** checkbox.

If you do not want to be reminded to perform this function, select the **Don't show me this again** checkbox and click **No**. You can import prior year data at any time by selecting **File** then **Import** from the menu bar, choosing **Global**, and selecting **Prior Year User-Defined Queries, Setup, and File Formats** as the Import Type.

### ***To Perform the Import of Your Prior Year User-Defined Queries, Setup, and File Formats***

1. Click **Yes** at the Prior Year Data dialog box.
2. Confirm that Prior Year User-Defined Queries, Setup, and File Formats appears as the Import Type.
3. Verify the location of your EDEExpress 2005-2006 database (expres56.mdb).
4. Select **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and enter a name for the file.
5. Click **OK**. The Prior Year Move dialog box appears.
6. Select the items you want to import by checking or unchecking the boxes in the Import column.
7. Select one of the following import options:
  - **Import All records for Setup Options Selected** imports all records without prompting you to select specific records.
  - **Import only Specific records for Setup Options Selected** prompts you to select the records you want to import for each group of records, such as Security Groups and Award Methodologies.
8. Click **OK**.
  - If you chose **Import All records for Setup Options Selected**, the In Progress dialog box appears.
  - If you chose **Import only Specific records for Setup Options Selected**, you are walked through a series of grids, allowing you to specify which records to import, after which the In Progress dialog box appears.
9. Click **OK** to close the In Progress dialog box.
10. Optional: Print the Import Prior Year Queries, Setup, and File Formats report.

These imports are also available from the Import dialog box on the Global tab after you log into EDEExpress.

***To Perform the Import of Your Prior Year Demographic Data or Prior Year User Data***

1. Select **File, Import** from the menu bar, then choose **Global**.
2. The Import dialog box is displayed. In the Import Type field, select **Prior Year Demographic Data** or **Prior Year User Data**.
3. Click **OK** at the bottom of the Import dialog box.
4. A confirmation report is displayed indicating the results of the prior year data import.

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## Setting Your Assumed School Code

The first time you use EDEExpress following installation, the Startup Information dialog box displays the warning “Global Assumed School not defined.” To eliminate this warning message, you must set your Federal School Code as the assumed school code in EDEExpress Global School setup.

**Note:** If you are a new school that has been recently assigned a Federal School Code, your code may not be available for selection in the EDEExpress database. Follow the instructions in “To Add Your School Code” if you are unable to locate your school in Global School setup.

### To Set Your Assumed School Code

Follow the steps below to set your assumed school code.

1. Select **Tools, Setup, Global, School**.
2. Click **OK** when you get the message, “No Assumed School.”
3. Click the **Retrieve** button to bring up a list of schools.
  - Select your school from the list by using the scroll bars and click **OK**.
  - Your school’s information appears in the institutional fields.

**Note:** If your Federal School Code does not appear in the list, click **Cancel** and follow the instructions in “To Add Your School Code” to add your school code to EDEExpress.

4. Select the **Assumed School** checkbox to define this as your assumed school.

**Note:** If you are a Direct Loan school and have both an application processing school code and a Direct Loan school code, be sure to use your application processing school code as the assumed school.

5. Click **Save** to save the record.
6. Click **OK**.

## To Add Your School Code

Follow the steps below to add your Federal School Code to EDEExpress.

1. Select **Tools, Setup, Global, School**.
2. Click **OK** when you get the message, “No Assumed School.”
3. Click **Add** (below the new record count box).
4. Type your Federal School Code in the **School Code** box, then fill in the data for your school.
5. Click **Save** to add the record to the EDEExpress database.
6. (Optional) Repeat steps 3-5 to add more school records.
7. Click **OK**.

After you have added your Federal School Code, follow the instructions in “To Set Your Assumed School Code” to set your Federal School Code as the assumed school code in EDEExpress Global School setup.

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# Resetting Your User ID and Password

If you have forgotten your password, your EDEExpress administrator can use the Security Users function to give you a new one.

## To Access the Security Users Function

1. Select **Tools** from the menu bar.
2. Select **Setup, Global, Security Users**.

If you are the EDEExpress administrator and you have forgotten your password, call CPS/SAIG Technical Support for help with resetting the password for the default SYSADMIN user ID.

All EDEExpress users, especially EDEExpress administrators, should record their user IDs and passwords and keep them in a safe place.

**New for 2006-2007!** The first time you log in, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. To disable the floating text, select **Tools, Setup, Security Users** from the menu bar and create a new user ID and password. Exit the software, and then log in again with your new user ID and password.

For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.



# System Requirements

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## Hardware and Software Requirements

The Student Assistance General Provisions regulations in 34 CFR 668.16(o) provide, in part, that to be administratively capable an institution must participate in electronic processes designated by the Secretary. These processes were first identified in a notice published in the *Federal Register* on September 19, 1997. In that Notice, we also provided information regarding the hardware and software requirements needed for an institution to participate in the designated electronic processes.

Because of advances in technology, we updated those hardware and software requirements in the *Federal Register* Notice published on December 22, 2000, and, most recently, in the *Federal Register* Notice published in September 2004.

The current designated electronic processes and new minimal and optimal hardware and software requirements can be found in the September 2004 Notice, available on the IFAP Web site at [ifap.ed.gov/fregisters/FR09142004.html](http://ifap.ed.gov/fregisters/FR09142004.html).

The following minimum and optimal hardware and software configurations are required for EDEExpress for Windows 2006-2007 users, per the September 2004 notice:

	<b>Minimum Configuration</b>	<b>Optimal Configuration</b>
IBM or Fully IBM-compatible PC	1.2 GHz Processor	2.8 GHz/333 MHz PC
	512 MB RAM	1 GB RAM
	60 GB Hard Drive	80 GB Hard Drive
	48x CD-ROM Drive (CD-RW recommended)	48x CD-ROM Drive (CD-RW recommended)
	Windows-compatible keyboard and mouse	Windows-compatible keyboard and mouse
Monitor and Video Card	Capable of SVGA (Super Video Graphics Video Graphics Adapter) resolution, 800 x resolution (800 x 600) or higher	Capable of SVGA (Super Video Graphics Video Graphics Adapter) resolution, 800 x resolution (800 x 600) or higher
Internet Connection*	56 Kbps modem (meets High-speed Internet or is upgradeable connection [for example, to V.90 standard])	High-speed Internet or is upgradeable connection (for example, to V.90 standard or DSL).
Printer	Laser printer capable of printing on standard paper (8.5" x 11")	Laser printer capable of printing on standard paper (8.5" x 11")
Operating System	Windows 2000 or Windows XP Professional recommended (Windows 98/98SE/ME are only supported until June 30, 2006).	Windows 2000 or Windows XP Professional recommended (Windows 98/98SE/ME are only supported until June 30, 2006).

\*A connection to the Internet is necessary to access the Information for Financial Aid Professionals (IFAP) Web site located at [ifap.ed.gov](http://ifap.ed.gov), and the FSAdownload Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov). In addition, an Internet connection must be established to enter FAFSA or ISIR Correction data using EDEExpress, since entry is completed through the FAA Access to CPS Online Web site. While we include high-speed Internet connection only in the Optimal Configuration, we encourage institutions to consider moving away from a dial-up connection if they intend to submit or receive large amounts of data. This will significantly reduce transmission time and will increase the probability of an uninterrupted transmission session.

The determination of which updated system configuration requirements to follow should be based on the number of Extensible Markup Language (XML) transactions your school will process. Pell and Direct Loan origination and disbursement data is exported from EDEExpress in the Common Origination and Disbursement (COD) Common Record format, which follows an XML schema (record layout).

Although all of the electronic processes included in the notice can be performed using the minimum configuration, we strongly recommend the optimal configuration if your school will send (transmit) and receive 4,000 or more records in an XML document (batch). We make this recommendation because XML file formats require greater storage and computing power.

You should also have the following hardware and software:

- Windows-compatible keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft-compatible mouse
- Microsoft Internet Explorer version 5.5 or higher

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## LAN Hardware and Software Recommendations

In addition to the configuration recommendations outlined in the “Hardware and Software Requirements” section, the following hardware and software components are recommended for running EDEExpress in a LAN environment:

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2003 server

**Note:** Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports

Refer to “Systems Requirements” for a complete listing of the general hardware and software required for EDEExpress.

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## Recommended Items to Consider

We strongly encourage you to use the following additional tools to assist you in managing and protecting your financial aid data:

- Backup system (for example, a CD or DVD “burner” drive with Read/Write capability, or a Flash Drive) with sufficient capacity to store your data (we recommend that you test your backup data regularly to make sure it’s working)
- Power supply backup and surge protectors
- Phone line surge protector
- Virus scan software with current virus definitions

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## Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each ED software product and for certain types of records.

To find out the approximate total space required, add the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 ISIR, National Student Loan Data System (NSLDS), Packaging, Pell, and Direct Loan records using all of the software products listed is approximately 119 MB.

Each software product requires the following space:

Product	Size
EDExpress for Windows	16 MB
EDconnect for Windows	15 MB
DL Tools for Windows	5 MB
Student Status Confirmation Reporting (SSCR) with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
ISIR	16 MB
NSLDS	7 MB
Packaging	3 MB*
Pell	2 MB**
Direct Loan	49 MB***

\* Includes only ISIR data imported into Packaging, for example, no budgets added, no records packaged, etc.

\*\* Includes two anticipated disbursements per origination record

\*\*\* Includes origination records only; no disbursements

# Local Area Network (LAN) Information

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## Installing the Software on a Network

### Installation Options

You can install the EDEExpress software to a LAN using one of three options:

1. **Network Server.** Use this option *only* when you are installing EDEExpress 2006-2007 to a network for the first time. The Network Server option only installs the EDEExpress database to a network location. It does not install the EDEExpress program files.

**Note:** If you receive a “ComponentMoveData” error message during a Network Server installation, you may not have sufficient network rights to install the database to your network. Check with your technical support staff if you receive this error message.

**Warning for Subsequent Installations:** Use caution when using the Network Server installation option. If you already have an EDEExpress database (expres67.mdb), the Network Server option will overwrite your database and you will lose all existing student data. You will receive a warning message during the installation if you are at risk of overwriting your database.

2. **Workstation Full.** Use this option when you are installing EDEExpress 2006-2007 for the first time on a workstation that will be used to access a network copy of the database and when you want to install all available EDEExpress software modules. You should also use the Workstation Full option to upgrade workstations to a new EDEExpress release (for example, to upgrade from Release 1.0 to Release 2.0).

3. **Workstation Custom.** Use a Custom installation to install components of the EDEExpress software to a workstation that will be used to access a server-based copy of the database. If you have previously installed a module, the module will not appear in the Select Components dialog box, as it will automatically be installed.

If you have already performed a Workstation Full installation of EDEExpress, you can use the Custom option to add files (such as Help files) or modules (such as Packaging) that you did not install the first time. This option leaves all other database and system settings intact.

**Note:** In EDEExpress 2006-2007, Release 1.0, Stand Alone Full installation is the default selection. For Release 2.0, Stand Alone Custom is the default selection.

**Important Installation Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install EDEExpress 2006-2007. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. After an Administrator has installed EDEExpress, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or “domain”) as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school’s technical department if you receive a warning that an Administrator must install the EDEExpress software.

## Installation Instructions

Follow the instructions in this section for installing the EDEExpress software on a network. For example:

- If you are installing EDEExpress for the first time, perform a full installation and follow the steps provided in “First Time Network Installation.”
- If you are installing EDEExpress after you have created data in the database, follow the instructions provided in “Subsequent Network Installation.”

When you perform a workstation installation, the executable file for EDEExpress (expres67.exe) and all other program files are installed to the workstation’s local hard drive. Do **not** install the program files to your server.

The installation modifies all EDEExpress program group icons on your Windows Start Menu folder to point to the executable file on your local hard drive.



Installing the EDEExpress executable file (**expres67.exe**) to the workstation's hard drive rather than the network file server improves the speed and performance of the software because EDEExpress uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions on the next page to install EDEExpress to a LAN.

**Note:** The EDEExpress software can be installed in Safe Mode, if necessary, but it cannot be run in Safe Mode.

**Note:** Be sure that all Windows applications are closed before you proceed with installation.

## First Time Network Installation

### *To Install the Software on a Network for the First Time*

1. First, select the **Network Server** installation option to install only the EDEExpress 2006-2007 database (**expres67.mdb**) on the file server, not the EDEExpress program files.
2. Enter the network server location where you want to install the EDEExpress 2006-2007 database. You can type the path or click the **Browse** button.
3. Follow the prompts provided by the setup program.
4. Second, perform a **Workstation Full** installation on *all* workstations that will access the server-based copy of the database for this release of EDEExpress. The Workstation Full option installs all program files, including the executable file (**expres67.exe**) to your local hard drive.

**Note:** The Workstation Full installation option prompts you for the location of the database installed during the Network Server installation (step 2). Be sure you know the location of the database on your network before installing EDEExpress.

### *Additional Instructions*

You are asked two location questions during a **Network Workstation** installation:

- The software first prompts you to enter the location of the database on the server. This question is asking where your database is located, not where you want the software installed.
- After the software has located the database, the software asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDESuite\EDEExpress for Windows 2006-2007**, or another local designation.

## Subsequent Network Installation

### *To Install EDEExpress on a Network Where the Software Is Already Installed*

1. Do *not* use the **Network Server** installation option for a subsequent network installation of EDEExpress. The **Network Server** installation option is only for users installing EDEExpress 2006-2007 to a network file server for the first time. Choosing this installation option installs an empty EDEExpress database file (**expres67.mdb**) on the network file server, overwriting your existing database.

If you select the **Network Server** installation option for a subsequent network installation of the EDEExpress software, the installation program alerts you that the EDEExpress 2006-2007 database has already been installed in the specified directory. Select **OK** to return to setup and choose a different installation option.

You should create a reliable, functioning backup version of your existing EDEExpress database (**expres67.mdb**) before upgrading to a new release.

2. Click the **Workstation Full** installation option.
3. When prompted for the location of your EDEExpress 2006-2007 database (**expres67.mdb**), provide the location of your existing database. Follow this and other prompts provided by the setup program to run the installation.

If this is a first-time upgrade to a subsequent release of the EDEExpress software, the database is upgraded after all workstation installations are complete. The upgrade occurs when a user accesses the software for the first time. Subsequent installations may or may not update the database, depending on the nature of the release and the issues or enhancements being added.

**Note:** All workstations should be upgraded with the latest release before you open the EDEExpress software to run the database update. If you fail to do this, any workstation not updated receives a software version/database mismatch error message if a user tries to run EDEExpress.

**Note:** If you are adding a workstation to your network environment, perform a **Workstation Full** installation of the current release of EDEExpress for that workstation.

### ***To Install Subsequent and Future Releases***

For all future releases of EDEExpress 2006-2007, perform a **Workstation Full** installation. The database structure is updated but not overwritten. Follow the instructions in “Subsequent Network Installation” for more information.

**Note:** Some EDEExpress service releases only update program files on your workstations, and do not perform any updates to your database. Refer to the electronic announcement and other documentation posted for a given EDEExpress releases for more information on the installation process that should be performed.

## **Instructions for Schools with Diskette Directories on a Server**

### ***To Install the Software Using “Disk” Files***

If you want to copy the installation “disk” files to a file server so you can perform workstation installations from the server, use the following steps:

1. Create an overall “Install” folder, then create subdirectory “disk” folders for each diskette folder downloaded from the FSAdownload Web site. For example, if you need to download six diskette installation files, then create the overall directory and six subdirectories on the file server as displayed below:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

\Install\DISK6

**Note:** The parent folder can have any name, but the subdirectories must be named DISK1, DISK2, etc.

2. Copy the contents of each disk into its corresponding folder on the server.
3. You can now install EDEExpress from the file server by running **setup.exe** from the DISK1 folder on the server instead of carrying the CD or Zip drive to each workstation.

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## LAN Server Compatibility

EDEExpress can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x
- Windows 2000 Server
- Windows 2000 Advanced Server
- Windows 2003 Server Family

**Caution:** You should not run the EDEExpress software on peer-to-peer networks, including the following brands:

- DEC Pathworks
- IBM LAN Server
- Sun PC-NFS

## LAN Cautions

When multiple users are concurrently updating the databases in the EDEExpress software, the student records being modified are locked. In addition, certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The database is locked when the executing function is mass loading records, such as the Import function.
- Records are locked when an executing function needs stable data for updating or printing.

- Functions are locked when multiple executions of the functions would destroy the databases. These functions include:
  - User Database (creating or deleting)
  - Compact and Repair Database
  - Verify Database

Your staff should not access EDEExpress 2006-2007 while you are running the utility functions listed above.

## LAN Messages

### *Novell*

These messages notify users when a locking situation occurs:

#### **LAN Error Message**

##### **Condition**

**<Database> is locked and cannot be accessed at this time.**

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

##### **Record in use - Retry later.**

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

##### **Function in use - Retry later.**

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.

## Additional LAN Instructions

If you are using a Novell NetWare product, enter the following commands from the NetWare Server Console prompt:

**Set Maximum Record Locks Per Connection = 10000**

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

## Windows 2000 or XP

If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install EDEExpress. If you are not an Administrator, the installation program warns you that you do not have sufficient rights to install the software. After an Administrator has installed EDEExpress, you can run EDEExpress 2006-2007 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or “domain”) as well as on your workstation. There are no workarounds for these Windows rights issues.

For more information, visit [microsoft.com](http://microsoft.com) and search for “file protection” to view Microsoft articles explaining the technical details of Windows 2000/XP file protection.

# Getting Help

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## Basics

To get help with the installation of EDEExpress:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use EDEExpress online Help.
- Contact Technical Support.
- Review Sources of Assistance for Schools

These approaches are described in the succeeding sections.

## Review Installation Instructions

If you have problems installing EDEExpress, first review the installation instructions again, then try repeating the installation process (make sure you include all steps).

If you are still having difficulty, contact CPS/SAIG Technical Support.



## Become Familiar with Your PC

After you have successfully completed the EDEExpress installation, click **System Information** from the Help menu.

Compare this information to the required configuration listed in the “Hardware and Software Requirements” section earlier in this guide. You may need to upgrade your equipment or your system’s configuration.

## Contact Your System Administrator

Your school or organization may have additional instructions for installing software using your PC. For example, you may get an error if you are trying to install the EDEExpress software to a drive for which you do not have access.

## Use EDEExpress Online Help

Instead of a paper user’s guide, EDEExpress has online Help.

General help is available from the menu bar, and field help is available by pressing the **F1** key.

See the topic “Using Help” in the online Help for more information.

You can access online Help by using any of the following methods:

- From the **Help** menu, choose a Help command.
- Choose the **Help** button available in most dialog boxes.
- Use the keyboard to select an item from a menu, and then press **F1** to see a description of the item.
- Select a dialog box option or command and then press **F1**, or click the **Help** button to move directly to an explanation of the option.
- Use the **Context Help** toolbar button to obtain help on menu options and other toolbars.

## Technical Support

### ***FSATECH Listserv***

FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, visit the Schools Portal Listservs & Mailing Lists:

[ed.gov/offices/FSA/services/fsatechsubscribe.html](http://ed.gov/offices/FSA/services/fsatechsubscribe.html)

For technical support, post an e-mail (including your TG number and all pertinent contact information) with your question. You will receive a response from Federal Student Aid staff or the financial aid partner responsible for the system that you have a question about.

**Note:** You must subscribe to FSATECH to send and receive messages from the list.

### ***CPS/SAIG Technical Support***

CPS/SAIG Technical Support can assist you with any questions regarding:

- Technical assistance
- Software functionality
- ISIR/custom file layouts
- EDconnect functionality

Call CPS/SAIG Technical Support at:

**800/330-5947**

**TDD/TTY: 800/511-5806**

or e-mail your inquiries to CPS/SAIG Technical Support at:

[CPSSAIG@ed.gov](mailto:CPSSAIG@ed.gov)

See the topic "CPS/SAIG Technical Support" in the online Help for more information.

Representatives are available to assist you between 7 a.m. and 7 p.m. (CT), Monday through Friday, excluding holidays.

## Guidelines for Calling Technical Support

When you call CPS/SAIG Technical Support, you must be at your PC and prepared to provide the following information:

- Your TG ID (TG followed by a five-digit number).
- The release of the software you are using (under Help/About EDEExpress for Windows).
- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, and type of memory management being used).
- The exact wording of any error messages you received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.
- A description of any resolution steps you took before calling.

### ***CPS/SAIG Voice Response System***

The CPS/SAIG Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to enter:

**1** for an English-speaking operator

**2** for a Spanish-speaking operator

## Review Sources of Assistance for Schools

*Sources of Assistance for Schools* is a document that contains helpful contact information for all Federal Student Aid programs, including frequently used help lines, e-mail addresses, and Web sites. You can download the *Sources of Assistance for Schools* from the FSAdownload Web site located at [fsadownload.ed.gov](http://fsadownload.ed.gov).